

Suitability Report

threesixty

Intelligent Office can be configured to supply template Suitability Reports written and maintain by **threesixty**, a nationally recognised provider of compliance and technical support to intermediaries.

threesixty's template Suitability Reports are used extensively by thousands of intermediaries already, many of whom have had their reports scrutinized during FSA visits.

threesixty now bring this experience and expertise to Intelligent Office users.

Reports can be generated directly from each client, pre-populating key information about the client and relevant policy details.

Each report contains product specific content which is regularly reviewed and updated to reflect regulatory and legislative changes.

Investments, pensions, protection and mortgages are all covered. Multiple products can be included in one single report.

Intelligent Office automatically identifies many of the relevant paragraphs based on the client's policy holdings so the user is not presented with a long list of options, just a compliant report ready for tweaking. The reports are brief, simple and easy to read, designed to summarise the recommendations made. They are not complex, weighty documents.



Products covered

The following is not an exhaustive list of every product covered, as threesixty can assist with additional templates on request:

- Level Term
- Decreasing Term
- Critical Illness Cover
- Family Income Benefit
- Income Protection
- Convertible Term
- Appropriate Personal
- Pension
- FSAVC
- Whole of Life (Unit Linked)
- Whole of Life (With Profits)
- ASU
- Personal Pension Plan
- Personal Pension Plan with employer contributions
- Stakeholder Individual
- Trustee Investt Pln
- Onshore Bond Unit Linked
- Pension Annuity
- SIPP
- Group Personal Pension
- Group Personal Pension Plan (employee advice)
- Group Stakeholder Pension
- Executive Pension Plan
- Onshore Bond With Profits
- ISA and Unit Trust/OEIC

Charges

No set up cost, minimum term six months followed by six months rolling notice. Charges paid monthly in advance by Standing Order. Charges based on number of Registered Individuals in the business.

Monthly Charge:

1 RIs	£25
2-5 RIs	£50
6-10 RIs	£75
11-15 RIs	£100
16-20 RIs	£125
20-30 RIs	£175
31-50 RIs	£250
50-100 RIs	£375
100+ RIs	£475

All charges subject to VAT.

Testimonials

Sense Network Chief Executive, Tim Newman, said "threesixty's reputation is such that you expect the reports to be compliant, but we have been impressed with how usable they are with clients. Where we have fed back minor suggestions for improvement, threesixty have been able to make adjustments very quickly. The reports save a lot of time for everyone involved."



Interested? For further details please contact us on **0845 230 3700**, info@intelliflo.com, www.intelliflo.com